



## Workforce Planning Team Matrix

Team Member	Who This Is	Team Role/Responsibilities	Why Include Them
Executive Sponsor	A high-ranking manager – it may be a department director, team leader, or human resources manager. This person has the authority to make decisions and understands operations.	<ul style="list-style-type: none"> <li>▪ The individual with the most ownership of the project.</li> <li>▪ Oversee creation and completion of the WFP.</li> <li>▪ Has the ability to obtain resources to accomplish the project.</li> <li>▪ Provide guidance and direction for the WFP effort.</li> <li>▪ Communicate progress internally and externally.</li> <li>▪ Ensure the linkage between strategic plans and workforce plans.</li> <li>▪ Include HR in strategic WFP.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Create a link to top management and outside stakeholders.</li> <li>▪ Provide clear communication.</li> <li>▪ <a href="#">Smoothly integrate the WFP with the agency's strategic initiatives.</a></li> </ul>
WFP Project Manager	Ideally, a manager with skills in communication, organization development, project management, and use of software tools.	<ul style="list-style-type: none"> <li>▪ Ensure coordination among WFP initiatives.</li> <li>▪ Provide standardized guidelines and training for WFP participants and for line managers and employees in Workforce Planning and related HR topics.</li> <li>▪ Provide a mechanism for coordinating and collaborating with all units, facilitating the gathering of and sharing of innovative practices.</li> <li>▪ Manage accountability for the WFP progress.</li> <li>▪ Lead the effort to maintain and update the plan.</li> <li>▪ Lead the communication strategy.</li> <li>▪ Prepare and provide/present/share reports.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provides Project Management Skills</li> <li>▪ Assists Executive Sponsor</li> </ul>

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Top Leaders – Executive Steering Team	Agency Head and Director-level and above: Operations; Program; HR; IT; Finance	<ul style="list-style-type: none"> <li>Identify the desired WFP change, the reasons for it, the expected benefits, and the impact the change may have on employees.</li> <li>Maintain commitment to the WFP and communicate that commitment.</li> <li>Provide leadership attention to accountability for implementing the WFP.</li> <li>Establish priorities for resource allocation for human capital efforts.</li> <li>Develop Goals and Performance Measures for WFP</li> <li>Provide the necessary resources and allow time for the changes to occur, but hold staff accountable for performance.</li> </ul>	<ul style="list-style-type: none"> <li>Recognize the need for Workforce Planning.</li> <li>Demonstrate commitment to WFP.</li> <li>Provide the resources to make WFP happen.</li> <li>Provide the vision of the future direction of the organization.</li> </ul>
Workforce Planning Project Team	Line Managers, staff from HR, IT, Finance/Budget; Union Reps; employees	<ul style="list-style-type: none"> <li>Develop and participate on sub-teams for the various Workforce Planning steps.</li> <li>Receive reports from sub-teams and incorporate information into overall workforce plan.</li> <li>Provide periodic reports on status of Workforce Planning to Executive Sponsor and Executive Steering Team.</li> <li>Manage the overall Workforce Planning project for the agency</li> <li>Prepare status reports as needed</li> <li><a href="#">Conduct an annual evaluation of the workforce plan</a></li> <li>Conduct lessons-learned focus group and provide a written report on lessons learned</li> </ul>	This cross-departmental team including staff and management will ensure the buy-in of the agency for Workforce Planning and integrate the WFP needs into the strategic planning process.
Line Managers	Line Managers and frontline supervisors	<ul style="list-style-type: none"> <li>Work with HR to <a href="#">gather data, identify gaps that exist in the current workforce when compared to future requirements</a>, determine priorities in key areas, and offer creative strategies for action plans.</li> <li>Participate in the development of WFP plans/initiatives.</li> <li>Integrate WFP initiatives into unit business plans.</li> <li>Implement the action plans in own operational area.</li> <li>Demonstrate commitment, support and leadership, and allocate local resources.</li> </ul>	<ul style="list-style-type: none"> <li>Provide a valuable source of organizational information.</li> <li>Provide them with ownership of WFP.</li> <li>Line Managers will use WFP to align HR actions (recruitment, training) with strategic goals and objectives.</li> <li>Identify key competencies.</li> <li>Responsible for implementing the WFP action plans in their operational areas.</li> </ul>

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Employees	Employees involved in the specific positions affected by Workforce Planning	<ul style="list-style-type: none"> <li>Provide feedback and share information and knowledge.</li> <li>Be involved in developing proposed solutions in the unit.</li> </ul>	Employees are a valuable source of information about the work – the duties and responsibilities and the competencies required to do the work.
HR	Director of HR may serve on the Workforce Planning project team and HR staff may serve on sub-teams	<ul style="list-style-type: none"> <li>Participate in the development of the WFP and unit-specific initiatives.</li> <li>Provide necessary workforce data.</li> <li>Work with line managers as partners to identify needs, competencies and gaps that exist in the current workforce when compared to future requirements.</li> <li>Assist in developing strategies, solutions and alternatives to address the issues.</li> <li>Provide human resources policy development expertise.</li> <li>Provide advice on techniques and strategies for addressing workforce challenges, and other specialized support.</li> <li>Provide input for issues related to recruiting and retaining racial and ethnic minorities, women and persons with disabilities, and related diversity issues.</li> </ul>	<ul style="list-style-type: none"> <li>HR can become more informed about the agency's core business and strategic initiatives.</li> <li>HR drives the data collection process, providing demographic data, retirement projections and turnover information.</li> <li>HR often follows up with the departments on the completion of their workforce plans.</li> <li>HR will be involved at the agency level in the development of the overall WFP.</li> </ul>
IT	IT Manager	<ul style="list-style-type: none"> <li>Provide information on current Workforce Planning data available; whether it's automated, etc.</li> <li>Help automate the collection and reporting of Workforce Planning data.</li> </ul>	Will provide programming needed to extract employee information from the HRIS or payroll system.

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Budget	Budget Manager	<ul style="list-style-type: none"> <li>Provide budget information including the number of positions allocated.</li> <li>Identify possible funding sources for WFP process costs.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure the linkage between the budget and WFP.</li> <li>Provide a source of knowledge on budget information including funding sources and the number of positions allocated.</li> <li>Workforce plans provide a sound basis for justifying budget and staffing requests, since there is/will be a clearer connection between objectives and the budget and human resources needed to accomplish them.</li> </ul>
Union	Elected Union representatives	<ul style="list-style-type: none"> <li>Participate with agency management to identify and resolve issues related to action strategy implementation through collaborative efforts and/or collective bargaining.</li> <li>May serve on the Workforce Planning Project Team</li> </ul>	Informing union representatives early in the WFP process of the intent and expected results of the WFP will smooth discussions regarding <a href="#">implementation of gap-closing strategies</a> .